



TRENDS & INSIGHTS

BATH ADDITIVES: GEN Z MARKET OVERVIEW

According to Mintel, the U.S. Soap, Bath and Shower products market is estimated to exceed **\$9.0 billion in 2020** retail sales, an increase of **39.9% from 2019**.

Source: Mintel Soap, Bath and Shower Products, US, February 2021

Conscious consumers

Often dubbed “Generation Green,” Gen Z are eco and socially-conscious consumers who place an emphasis on sustainable and ethical products and practices. They strongly believe in a brand’s social responsibility and their environmental impact.

Eco-ethical claims will continue to increase in soap, bath and shower product launches, as resources become limited, and Gen Z continues to expect them.

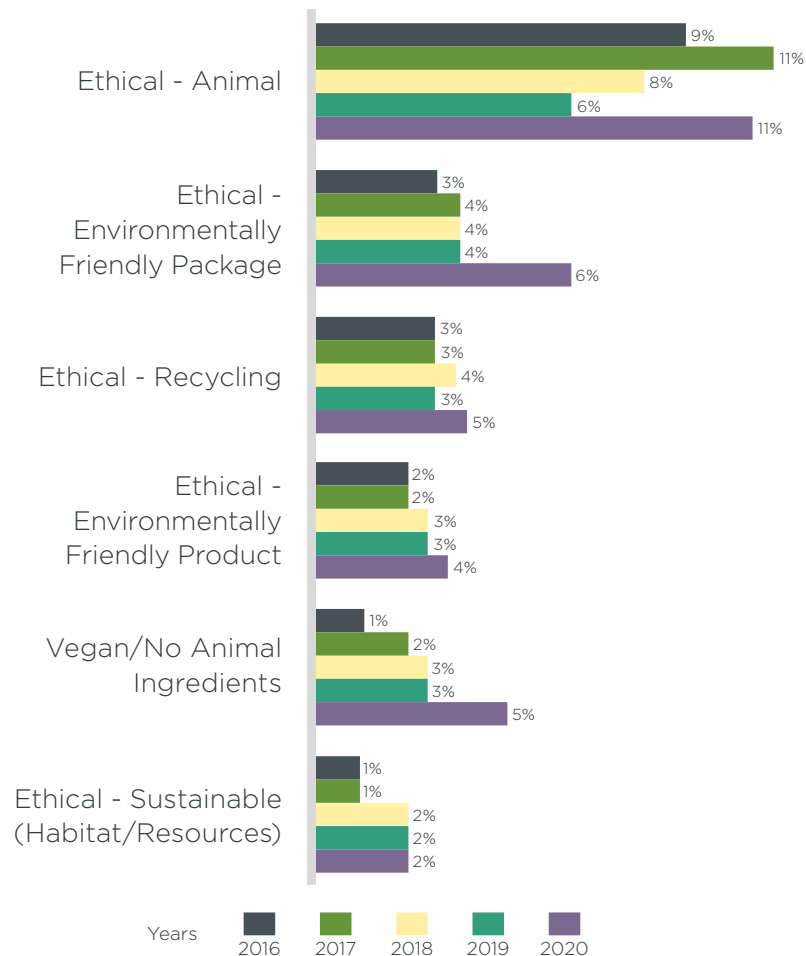




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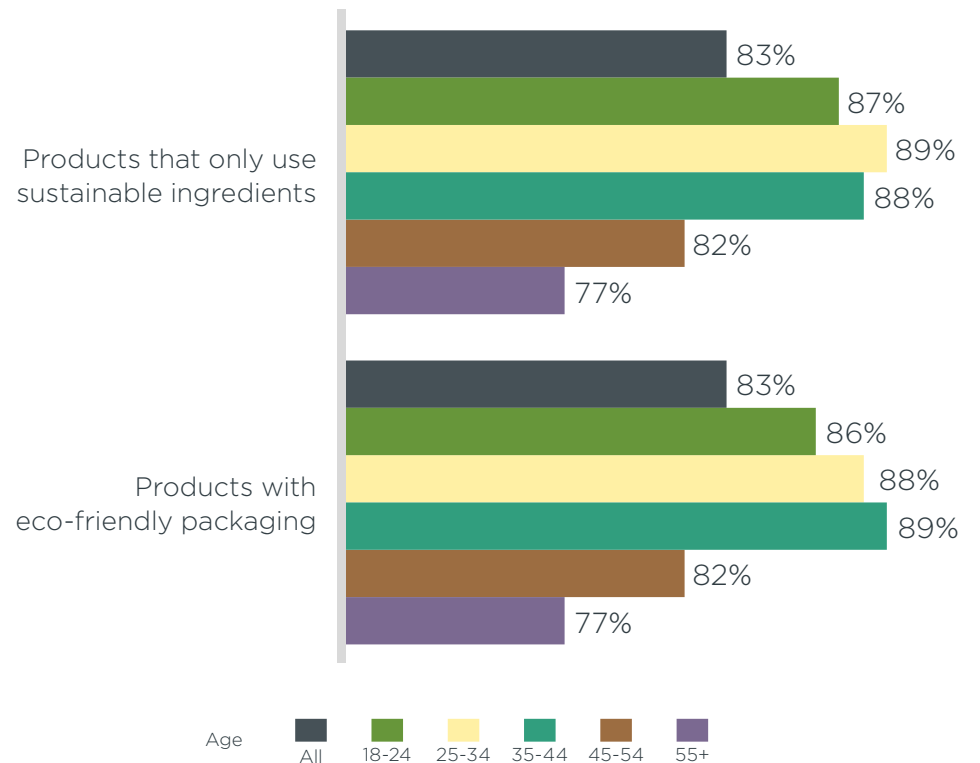
Eco-ethical claims in new soap, bath and shower launches 2016-2020



Interest in eco-friendly innovations

Eco-friendly innovations are important to all generations but particularly important to the younger demographics.

Which of the following describes your interest in and willingness to spend more (compared to your normal products) for these soap, bath, and shower products?



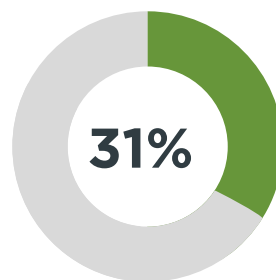
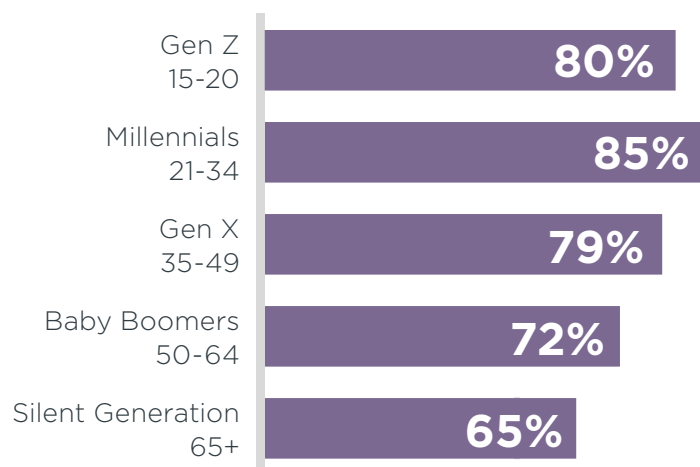
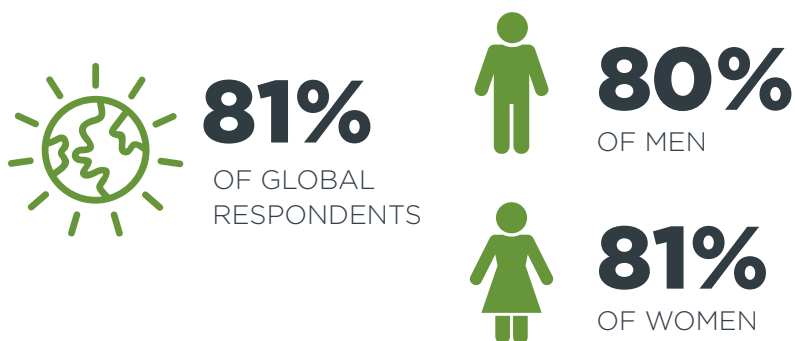


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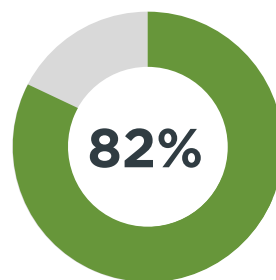
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Gen Z purchasing attitudes and behaviors:

Percentage of responders who said that it is "extremely" or "very" important that companies implement programs to improve the environment.



Almost a third (31%) of millennials always check whether high-end brands foster sustainable values before purchasing.



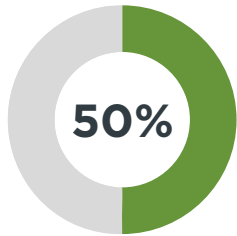
Eighty-two percent of US millennial and Gen Z consumers would switch to a natural product if they found one with comparable results to a non-natural alternative.

Source: Bodycare_Projections_2020_scr.pdf



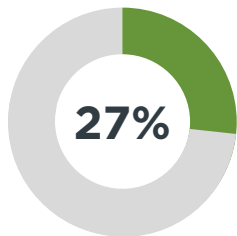
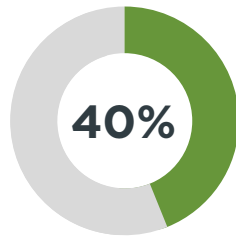
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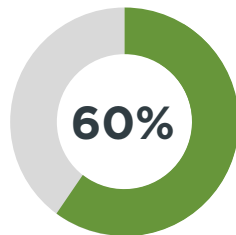
50% of Gen Z wouldn't purchase from a skin care or cosmetics brand that wasn't certified as cruelty free.¹

40% of Gen Z say that diversity and inclusion is the most important brand value to them when shopping for beauty products.²



27% have deliberately bought skin care/cosmetic products because of the brand's sustainability initiatives.¹

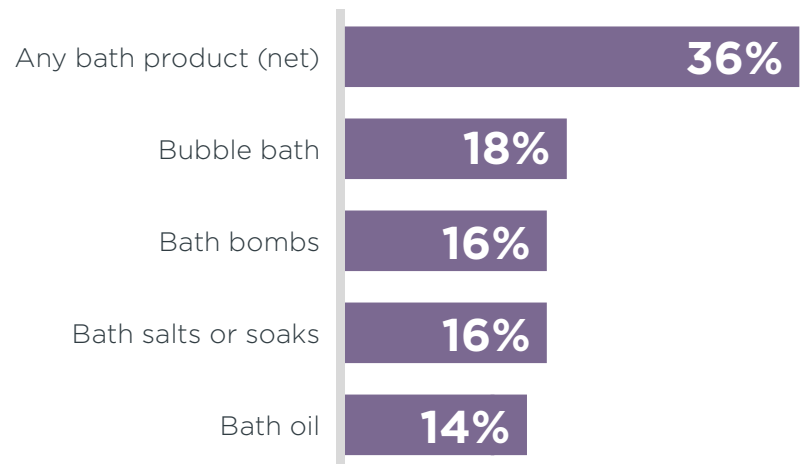
60% purchase a beauty product before they are 14 years old.³



Bath additives usage

Showers are traditionally more convenient than baths because of individuals' busy schedules. According to Mintel's 2020 research, 31% of adults agree they only take baths when they need to relax, while 20% do not take baths. However, as mentioned, the pandemic changed consumers' behavior and consumers are bathing more to relax. Consumers of all genders and ages add a variety of bath additives such as bath bombs as well as bath salts and soaks to create a relaxing bath experience.

Usage of bath products

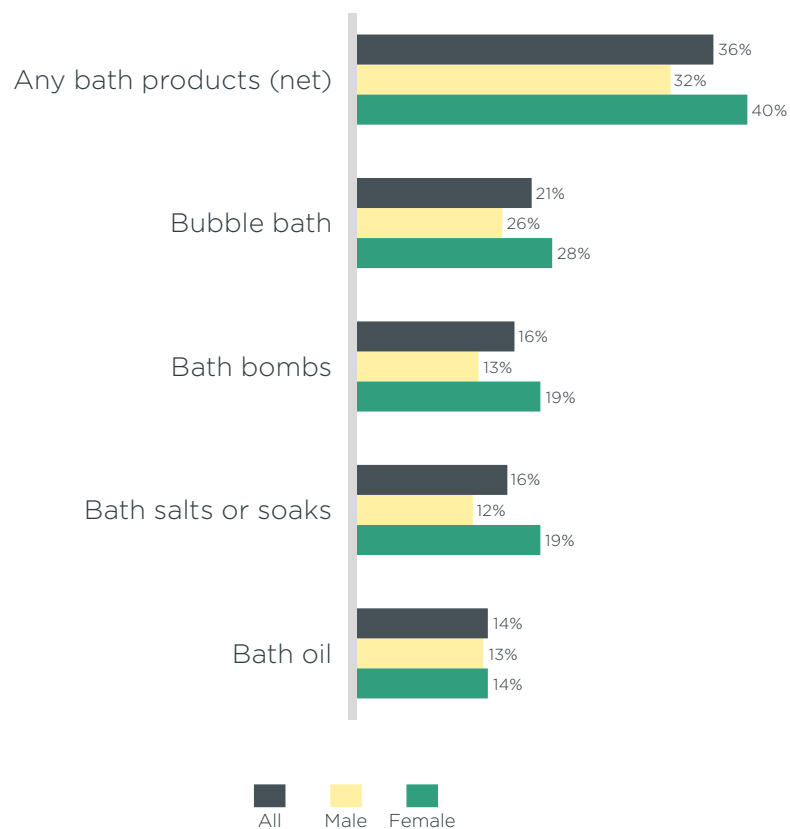




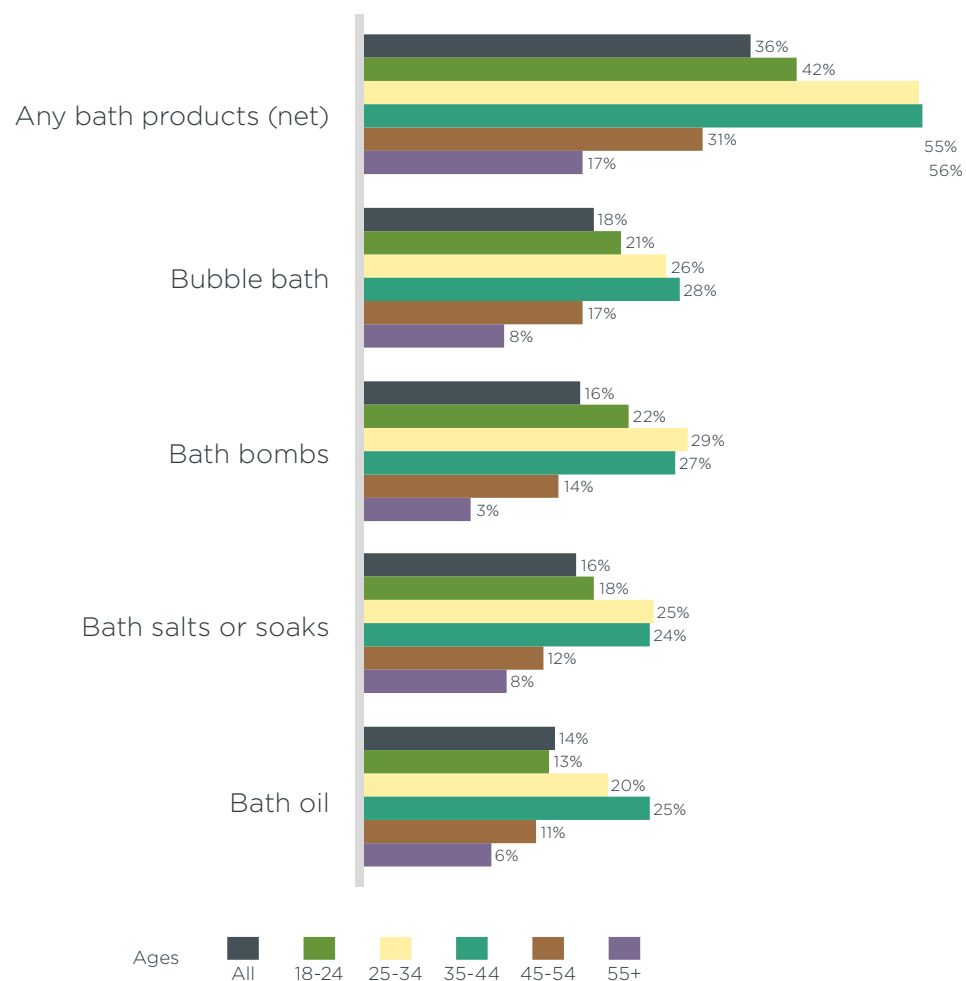
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Usage of bath products by gender



Usage of bath products by age





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NATURAL AND VEGAN FORMULAS

Ethical brands that create natural, cruelty-free, and vegan formulas address Gen Z's concerns for ethically sourced ingredients as well as animal welfare. In addition, many of these clean products support mental health and wellbeing.

Love Beauty and Planet



Unilever has extended its Love Beauty and Planet line with the Beloved collection of bath and body products sold exclusively at Target. Each collection is infused with ethically sourced fragrance extracts including essential oils and absolutes. The bath products are certified cruelty-free and vegan by PETA and contain sulfate-free and paraben-free formulas. The bath bombs are offered in seven scents: Cactus Flower & Basil, Cherry Blossom & Tea Rose, Coconut & Warm Vanilla, Grapefruit & Red Ginger, Green Clay & Eucalyptus, Lavender & Hyssop (shown), and Patchouli & Orange Flower. For the holidays, Unilever launched the #PlanItForThePlanet pledge campaign asking consumers to shop before December 4th to reduce rush shipping and our impact on the planet. The company will donate up to \$150K to the National Forest Foundation's reforestation efforts.

Cure-ist



The Cure-ist is a Millennial brand designed to prioritize self-care while contributing to mental health awareness. The bath bombs have kitsch names and are brightly colored with biodegradable glitter made from plant-based cellulose. The products are 100% vegan, non-toxic, cruelty-free, and are free of parabens and phthalates. The Bath Bomb Bundle features the brand's six scents: Boujee: Bergamot / Tuberose / Vetiver, Insomniac: Lavender / Lemon / Mint / Moss, Lit AF: Citrus / Grapefruit / Bergamot, Millennial: Freesia / Lily of the Valley / Sugar Vanilla Musk, R.B.F.: Eucalyptus / Peppermint / Lemongrass, and Thank U Next: Fruit Punch / Jasmine / Tonka Bean.

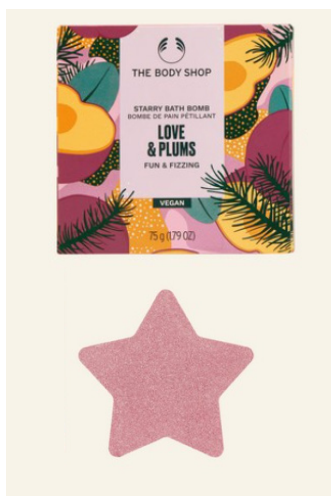


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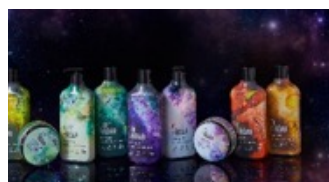
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The Body Shop



Purpose-driven, ethically sourced, and naturally-based ingredient brand The Body Shop released a limited edition Christmas bath bomb line in three scents: Joy & Jasmine Starry Bath Bomb, Kindness & Pears Starry Bath Bomb, and Love & Plums Starry Bath Bomb (shown). The products are certified by The Vegan Society and packaged in 100% recyclable cardboard. The Joy & Jasmine features jasmine extract from India, Community Fair Trade organic aloe vera from Mexico and notes of orange flower, rose, and sensual jasmine while Kindness & Pears contains pear extract from Italy, Community Fair Trade organic aloe vera from Mexico and notes of pear, strawberry, and warm tonka bean. Love & Plums is enriched with plum extract from Turkey, Community Fair Trade organic aloe vera from Mexico and notes of plum sorbet, peony, and musk.

Quiet & Roar



In 2021, Procter & Gamble launched the Quiet & Roar brand specifically designed for Gen Z. It is a PETA cruelty-free, multi-sensorial bath and body care line formulated with five essential oils and free of dyes, parabens, or phthalates. The products are available exclusively at Target and are "designed with expertly crafted scents to engage your senses and free your mind from the mental noise that holds you back." There are five variants offered: Awaken In Peach + Green Tea, Relax In Lavender + Spirulina, Renew In Lemon Blossom + Mint, Revive In Pineapple + Kiwiberry, and Soothe In Coconut + Banana Milk.

Foxtrot



Foxtrot (online convenience store) is going bigger on beauty in 2022, launching private label body care brand Best Bubs, targeting Gen Z and Millennial customers, respectively. Best Bubs Bath Bombs: Splish Splash is a hydrating, vitamin-rich blend of Amyris, shea butter, Ho wood, and cedarwood. Moontime is a fragrant blend of lavender, geranium, chamomile, coconut, Epsom salt, and jojoba, and Rubber Ducky is an antioxidant-rich mixture of mango butter, orange, grapefruit, peppermint and bergamot to energize and invigorate the senses.



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POP CULTURE INSPIRATION

There is a variety of stimuli for bath products and Pop Culture is always inspirational. From food to Netflix shows to strong women leaders, all act as a muse for bath bombs. Many of these introductions are limited-editions, which infuse newness and relevance to the category. The packaging and aroma also play a key role in these bath bombs reflective of the times.

Nectar USA



Nectar USA's philosophy is "to put the fun in functional through handcrafted experiences with delightful bath and beauty treats that put a smile on your face and the cherry on top of every #SelfCareSundae." The brand creates a variety of fun bath additives inspired by sweet treats such as waffles and donuts. The bath bombs are scented and formulated with Epsom salts, kaolin clay, and moisturizing oil such as almond or coconut.

I Heart Revolution



British-based cosmetics and skincare brand Revolution Beauty partnered with Warner Bros. Consumer Products to create the I Heart Revolution x PEBBLES collection. The line is inspired by Fruity Pebbles and Cocoa Pebbles cereals. The multi-colored rainbow bath crystals feature a fruity fragrance and super vibrant colors that melt in the bath.

Merci Handi



French Lifestyle brand Merci Handy was inspired by Netflix's Stranger Things series and created the Upside Down Volume 2 set that includes a bath bomb, exfoliating soap, and hand cleansing gel. The package is reminiscent of a VCR cassette tape and the scent is described as "a dazzling scent that will turn your world upside down and take you to the other side. Intense and sophisticated, it unveils spicy and woody notes in an oriental vanilla trail."

Musee



The Women of Change Bath Balm Bundle by Musee features bath balms inspired by five remarkable women and their stories: Amelia Earhart, Frida Kahlo, Maya Angelou, Rosa Parks, and Ruth Bader Ginsburg. The bath balms are handmade in the USA with ethically sourced, natural ingredients that are cruelty-free, paraben-free, and sulfate-free. Each bath balm is individually packaged and has a magnet inside.

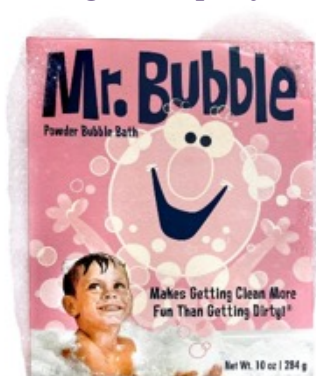


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Village Company



Honorable Mention: To celebrate Mr. Bubble's 60th anniversary, the Village Company released the limited-edition Powder Bubble Bath in its iconic retro packaging. The reformulated bubble bath formula features the original nostalgic bubblegum scent and is cruelty- and paraben-free as well as gentle on sensitive skin.



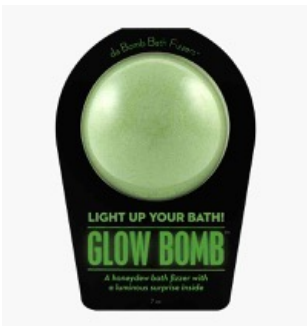


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FUN, PLAYFUL, COLORFUL, INTERACTIVE

Gen Z enjoys bath experiences that are sensorial and interactive. Colorful bath bombs that are scented and contain a surprise are entertaining and enjoyable.

Da Bomb



Founded by teen sisters Caroline and Isabel Bercaw, Da Bomb Fizzers are bath bombs designed to be fun and interactive with a variety of scents, colors, clever names, and a surprise inside. The newest activity is licensed bath bombs from partners such as Disney and Mattel. The Glow Bomb is a honeydew fizzer with a small plastic box with a bright light inside. The light turns on in water and off out of water.

Lush



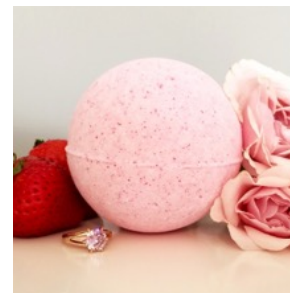
Lush is known for its signature bath bombs, which launched in 1988. The Intergalactic bath bomb offers a cool, peppermint, grapefruit and cedarwood scent with neon colors and plastic-free glitter making it a fan favorite and best seller. It creates a sensorial, cosmic bath experience.

Lush



Toby's Magic Cow is one of Lush's many new bath bombs. The white bath bomb highlights a colorful surprise and when immersed in water a sparkling rainbow of colors appears as well as popping candy that cracks and crackles. Its aroma is the Milky Bath fragrance with patchouli oil, Brazilian orange oil, and coconut powder.

Pearl Bath Bombs



Bath bomb market leader Pearl Bath Bombs launched in 2015. The brand is best known for its bath bombs that feature a pink pearl concealing a hidden ring surprise inside. The rings are made with .925 Sterling Silver, or 14k Rose Gold, 18k Gold or Platinum-plated. The bath bombs are made in the USA, small batch, natural and cruelty-free and offered in a variety of designs and scents. The Strawberries & Champagne Ring Bath Bomb is shown.



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THE YOUNGER SET

For the younger demographic of this generation, there is a DIY component to create fun, hands-on multi-sensory and interactive experiences. Color, scents, and texture are important elements of the bath experience.

Nailmatic



French brand Nailmatic started as a plant-based, nail polish brand sold in a vending machine. The brand expanded to add a kids nail care collection and eventually moved into the bath category with fun and interactive designs. The Foaming & Coloured Bath Salts have a fruity scent and when added to the bath turn into a colorful foam making bath time fun. The products are preservative-free, vegan, cruelty-free and available in Blue, Pink, Lagon, and Violet.

Klutz



Klutz is a division of Scholastic, the publisher and distributor of children's books. The Klutz Make Your Own Bath Bombs Activity Kit features a 36 page detailed instruction book with brightly-colored images, five different shaped molds, three colored baking sodas, citric acid, glycerin, and a strawberry kiwi scent. Kids can learn the science behind bath bombs and make up to 12 colorful bath bombs.

Dove



Dove Kids Care bath collection's mission is to "teach kids the power of self-care" and each package features positive affirmations and provides access to interactive body confidence resources. Packaged in 100% post-consumer recyclable plastics, the range is tear-free made with 100% skin-natural nutrients without any sulfates, parabens, or phthalates. Additionally, the products are hypoallergenic, dermatologist and ophthalmologist tested. For the holiday season, Dove Kids Care Bath Time Fun Gift Set includes Cotton Candy Bubble Bath, Slime Body Wash, Bath Crayons and Positive Affirmation mirror or shower cling.



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SUSTAINABLE WATERLESS FORMATS

Gen Z has grown up with climate change. Sustainability and environmentally-friendly products resonate with this audience, and they expect corporate sustainability and responsibility. To address single-use plastic packaging, brands are creating waterless body wash formats.

Plus Body Wash



Plus Body Wash is a single-serve 100% dissolvable sachet. The single-serve plastic-free body washes are made with aloe leaf, eucalyptus, shea butter, almond oil, and sunflower oil. They are available in Cloud, Summer, and Waves scents. The dehydrated squares turn into foam when wet and are wrapped in a sachet made of wood pulp from responsibly managed FSC forests, which dissolve down the drain. The ink is non-toxic, bio-renewable, and FDA approved. According to the brand, compared to bottled body washes, Plus reduces CO2 emissions in shipping by 80% and saves 38% water in manufacturing.

Everist



Everist has added a Waterless Body Wash Concentrate to its portfolio. The Waterless Body Wash Concentrate is a paste application that is plant-based, vegan, and cruelty-free. It is formulated with a blend of essential oils including orange peel, bergamot, peppermint, rosemary, and clary sage. The sustainable product is housed in a recyclable aluminum package.

900.Care



French brand 900.Care derives its name from the average number of seconds spent in the bathroom. To address the zero-waste movement, the brand introduced a subscription-based line of bathroom products that feature reusable containers and solid refillable formulas. The brand offers Shower Gel sold as a concentrated ball that dissolves in water. The Shower Gel is offered in nine different colored bottles and six scents: Almond, Aloe Vera, Fig-Coconut (shown), Honey, Ocean, and White Lily.

Haeckels



UK Brand Haeckels 60% H2O Ocean Cleanse Concentrate + Allantoin is a sustainable alternative to standard body cleansers. It is an entirely waterless shower gel that comes in pill format and the natural concentrate is activated by water. Sold as a year's supply, consumers are instructed to take three pills and add boiled water to the ceramic dispenser. It is scented with lemon, geranium, and beetroot.



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